

## WITS Changes – 18.10.2 Release SUD

07/25/2016

In the 18.10.2 4 bugs were repaired in WITS. Below are a summary of the errors and the resolutions of the problems.

Issue	Resolution
<b>GAIN: Clients with newly downloaded GAIN Summaries have previously completed intakes listed as "In Progress"</b>	GAIN: The issue with Intake status when downloading a GAIN-I Summary (GRRS) report is resolved, previously completed Intakes won't be set back to "In Progress" status again after the GRRS report is downloaded and updated in WITS.
<b>Follow-Up: Yellow screen error when user clicks "Save" or "Finish"</b>	ID - Follow-Up: Fixed a yellow screen error that occurred when saving a Follow up record.
<b>Consent/Eligibility Screener: "Disclosed to Agency" is blank</b>	Consent/Eligibility Screener - ID: "Payor Plan Groups" box populates all the available plans based on the Eligibility screener date. Meanwhile, "Disclosed to Agency" dropdown is filled with the appropriate agencies on Consent screen.
<b>Referral: New duplicate client check screen causes problems (ID)</b>	Referral: Resolved issues that occurred while accepting a referral on the duplicate client check screen.

Below you will find a summary of the change to WITS for the 18.10.2 release (which took place 7/25/2016). When these changes are made in Idaho-Mountain and Idaho-Pacific, the top left portion of your screen will say 18.10.2.

## Duplicate Client Check

**Purpose: When creating a new Client Profile or accepting a Referral, WITS will search your agency for clients with:**

- First 3 characters of first name, first 3 characters of last name, and year of birth and will exclude clients with first or last name with less than 3 characters.  
OR
- First character of first name and last 4 numbers of SSN (excluding SSN = 0000)  
OR
- Soundex\* of first name, Soundex of last name, and year of birth  
OR

- Soundex of first name and last 4 numbers of SSN (excluding SSN = 0000)

## What does this mean when I am accepting a referral?

- You no longer need to link a consent from another agency to an existing client in your agency.
  - Receive a referral in the status of pending. Change the status to placed accepted and click save. A list of similar clients will display.
  - If you select a similar client from the list, the most recently updated Client Profile will be created in your agency.
  - If You click Yes, a new client profile will be created.
  - If you click No, the referral will stay in a status of pending.

## What does this mean when I am creating a new client?

- When creating a new client profile and you click save, a list of similar clients will display.
  - If you select a similar client from the list, the most recently updated Client Profile will be created in your agency.
  - If You click Yes, a new client profile will be created.
  - If you click No, a new client profile will not be created.

## Accepting a Referral

1. Getting here: Login, click **Agency, Referrals, Referrals In** on the Navigation Pane (left menu).
2. **Enter the search criteria.**

### 3. Click



User: Barnes, Joshua

Location: Provider Training Agency, Treatment Location 1

Snapshot

Home Page

Agency Contacts

Agency

Agency List

Agency Profile

Events

Aliases

Contacts

MU Query

Governance

Relationships

Announcements

Referrals

Referrals In

Authorizations

Referrals In Search

Referral Status Codes

Placed/Accepted

Referral Terminated

Refused Treatment

Rejected by Program

Search Criteria

Referral Created/Pending

Unique Client Number

Created Date

Referred Date

First Name

Last Name

Clear

Go

Referrals for Treatment Location 1

(Export)

Actions	Unique Client #	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
	10808180000023A	Wilson, Waid	8/8/1980	7/21/2016	DHW Contractor/Central Office	Assessment	Referral Created/Pending	Treatment Location 1	

4. Hover over  under Actions and click **Review**.

Referrals In Search


Referral Status Codes  
Placed/Accepted  
Referral Created/Pending  
Referral Terminated  
Refused Treatment

Search Criteria

Unique Client Number  Created Date  Referred Date

First Name  Last Name

Referrals for Treatment Location 1 (Export)

Actions	Unique Client #	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
 <b>Review</b>	1080818000023A	Wilson, Waid	8/8/1980	7/21/2016	DHW Contractor/Central Office	Assessment	Referral Created/Pending	Treatment Location 1	

5. Update the Appointment Date and Status if appropriate.

6. Change the Referral Status to **Placed Accepted**.

Referral

Referred By

Agency DHW Contractor

Facility Central Office

Staff Member Barnes, Joshua

Program

State Reporting Category

Reason Service not available at this facility

If Other

Is Consent Verification Required? Yes

Is Consent Verified? Yes

Continue This Episode of Care? No

Comments

Referral Status **Placed/Accepted**

Referral Date 7/21/2016

Projected End Date

Created Date 7/21/2016 10:07 AM

Referred To

Signed Consents Provider Training Agency

Agency Provider Training Agency

Facility Treatment Location 1

Staff Member

Program Adult GAIN-I Assessment (NA)

State Reporting Category

Non-System Agency

Non-System Modality

Non-System Specifier

Appt Date  Undetermined

Consents Granted

Consent Date: 7/21/2016

Disclosure Domains:

Client Information (Profile) (UD, +30)


Consent (UD, +30)

Eligibility Screener (UD, +30)

7. Click

**Finish**

Similar Clients already exist in the System and are listed below. Do you wish to continue inserting this client record? Click "Yes" to continue to Add the record or "No" to Cancel the creation of the new record. The Select Action will take you to the record of the duplicate client.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
 <b>Select</b>	10808180000023A	Wilson, Wade	8/8/1980	000-00-0000	Male

**Yes**

**No**

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8. A list of similar clients displays. Click Select if one of the clients displayed matches your client.

What if none of the clients listed is my client?

- Click **Yes** to continue and create a new Client Profile.
- OR
- Click **No** to cancel the creation of the Client Profile.

9. A Client Profile with information from the selected client will be created in your agency, including:

- Client Name & other demographic information
- Alternate Names (if any)
- Additional Information
- Contact Information, including all addresses
- Allergies (if any)
- Benefit Application (if any).

## Profile

First Name	Wade	X
Middle Name		
Last Name	Wilson	
Suffix		
Gender	Male	▼
DOB	8/8/1980	📅
SSN	000-00-0000	

Provider Client ID	
Unique Client Number	10808180000023A
State Client ID	
Record Created By	Barnes, Josh
Last Updated By	Barnes, Josh
Created Date	10/14/2015 1:44 PM
Last Updated Date	10/14/2015 1:44 PM

Driver's License

Access Category ▼

Has paper file	Yes	▼
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### – Administrative Actions

Cancel

Save

## Finish



## 10. Click

Save